

**Phoenix Program
Process Definition – Purchasing Module**

Process	<i>Requisition Chartfield Approval</i>
Process Number	<i>PO – 006</i> <i>Revised 04/14/00</i>

Description of Process

This process describes the review and approval of Requisition Chartfields for agencies using the PeopleSoft approval process.

Input to Process

Requisitions in “Pending Approval” status.

Output of Process

Approved, Denied or Recycled Requisitions. Denied and Recycled Requisitions remain in a “Pending Approval” status.

Service Level Agreement Required? (if yes, provide a brief description)

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PeopleSoft Panel Groups being Used

Function	Panel Group
Requisition Chartfield Approval	Requisition Chartfield Approval

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Business Process Description

Process Description	Responsibility (Agency/Centralized)
Step 1: Navigate to the Requisition Items menu (Go, Administer Procurement, Requisition Items).	Agency Approver
<p>Step 2: Navigate to the Requisition Items Chartfield Approval panels (Use, Chartfield Approval, Approval).</p> <p>The Chartfield Approval dialog box displays.</p> <p>Enter search criteria:</p> <p>To search for a specific Requisition, enter the Business Unit and Requisition ID. Click OK. The Requisition Chartfield Approval panel displays.</p> <p>To display the list of Requisitions in a "Pending Approval" status, key the "Origin" code for which approver has approval authority, or leave this field blank if authorized to approve for multiple origins. Review the list and select a Requisition for chartfield approval.</p>	Agency Approver
<p>Step 3: Review chartfield data displayed on the "Approval" panel.</p> <p>Go to the "Details" panel to review further detail.</p>	Agency Approver
Step 4: On the Details panel, reviews line descriptions, quantities, and amounts.	Agency Approver
<p>Step 5: Returns to the "Approval" panel and selects an "Approval Action" of "Approve", "Deny" or Recycle. If "Deny" or "Recycle" is selected, keys a reason in the "comment" field provided, and any instructions to the buyer regarding corrections to the chartfields.</p> <p>Note: Generally, "Deny" is used if the Requisition is to be canceled, and "Recycle" is used if the Requisition chartfields need correcting.</p>	Agency Approver
Step 6: Save the panel and repeat the process for other Requisitions requiring Chartfield approval.	Agency Approver

Forms Used with Process (#)

**Attach sample form(s)

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Process Flow Diagram (if appropriate):

A large, empty rectangular box with a thin black border, intended for a process flow diagram. It occupies the central portion of the page below the title and above the footer.